<< Agency Name >>
MENTAL HEALTH SERVICE LINE

PROCEDURE: ELECTRONIC HEALTH INFORMATION EXCHANGE
THROUGH ILHIE DIRECT

PURPOSE:

To set standards for the secure exchange of client information through the ILHIE Direct messaging system and ensure that client's rights are protected in the exchange of information.

PROCEDURES:

1. ILHIE Direct is a secure messaging system established by the Illinois Office of Health Information Technology for the exchange of Protected Health Information between registered medical and behavioral health providers. ILHIE Direct functions like an email system with the ability to attach clinical documents to a secure email message to be sent to another provider.

2. SASS is utilizing ILHIE direct to exchange client information with 3 hospital partners and other SASS providers to improve care coordination 1) at the time of psychiatric hospitalization, 2) for case transfer between SASS providers, and 3) during inpatient treatment, and discharge planning.

3. Use of ILHIE Direct for the exchange of Protected Health Information operates under the laws and protections for confidentiality of mental health information. Consent for the release of information must be valid at the time of disclosure through ILHIE Direct, or the client situation must meet the conditions in which disclosure can be made without consent.

4. **Sending files during a SASS Crisis Screen that results in hospitalization:**
   A. SASS workers should follow program procedures for seeking client & guardian consent for the SASS screen and the provision of SASS services, which includes: authorization for monitoring the hospitalization, reviewing hospital records, and obtaining discharge summaries. Consents will be signed on a paper document and scanned for inclusion in the electronic record, in our EHR System, the next business day.

   B. SASS workers will complete the SASS Screening Assessment and the CSPI within Our EHR System and secure admission to a hospital unit per usual procedure. When phoning the hospital to locate a bed, inform them that you will be sending the documents through ILHIE Direct.

   C. All documents will be saved to a central file that has been established on the AGENCY network under the Group Drive at << Location >>. Two new folders have been created for the ILHIE project under the ALL → SASS

folder: **From-Us** and **To-Us**. Documents that originate from SASS to be sent to a hospital or other SASS provider will be saved in the **FROM-US** folder. Documents that are download from hospitals and other providers from An ILHIE Direct message will be save in the **TO-US** folder.

D. The SASS Assessment and the CPSI are each viewable as a "report" in Our EHR System after the SASS worker electronically signs the document. Each document can be exported from Our EHR System by clicking the link to the SASS Crisis Screen and CSPI in the client's ECR. Click the **Report** button, found on the left, of each document to open up a PDF file of the document.

E. Save the document using **File → Save As** to the SASS folder on the Group drive at << Location >>, which you should be able to access because of your secure VPN connection: **Group on << Location >> → All → SASS → From-Us**. Use the following naming convention to rename the file:

> firstname.lastinitial_document_OurName_MM-DD-YY

    Example: **tatiana.s_Screen_OurAgencyAbbrev_10-09-12**
                           tatiana.s_CSPI_ OurAgencyAbbrev_10-09-12

F. If the client that you have screened is an active Agency client, create a CCD in Our EHR System for transmission to the hospital along with the SASS screening documents. This document will provide the treatment diagnosis and current medications for the hospital's records.

CCDs are created through the client's ECR: **ECR → Show Menu → Continuity of Care**. Use the following steps to create the CCD: Click the **Create CCD** in the action corner on the upper right side of the Our EHR System screen, then complete the Begin Date, End Date (today), CCD Reason (select: Clinical Summary) and Request Date (today), then click Submit. The document will be created and appear in a table. To export a copy of the document, click the **Print** button on the left, then click **Save**. You must verify that the file will be saved in the correct folder location, so check the Save In destination box at the top. To get to the correct folder, you may have to choose the following: **Group on << Location >> → All → SASS → From-Us.** Use the same naming convention as above, except that you will use CCD for the file name:

> firstname.lastinitial_CCD_ **OurAgencyAbbrev**_MM-DD-YY.

Example: **tatiana.s_CCD_ OurAgencyAbbrev_10-09-12**

G. Log in to your personal ILHIE Direct account at https://mail.ilhiedirect.net and begin a new message. Select the appropriate account for Hospital1, Hospital2 or Hospital3 Behavioral Health. Attach the CSPI, the SASS Crisis

Screen, and the CCD (if available) that you saved in the From-Us folder. Write a brief message concerning the hospitalization, and send the message.

H. Screening staff need to confirm with the hospital that they have retrieved the documents, either by phone or through message reply in ILHIE. This should be documented in your progress note for the hospitalization.

I. Include in your SASS screening progress notation that you have sent the documents via ILHIE Direct and have confirmation that they were received by the hospital.

5. **Downloading files from other providers sent via ILHIE Direct:**
   A. Files should be directed to the central SASS.AGENCY@AGENCY.ilhiedirect.net account on ILHIE Direct rather than to personal staff accounts. The SASS supervisor, plus one or more authorized staff, will be the only staff to have the login password to download files from the SASS.AGENCY account.
   B. A valid Consent for the Release of Information is required for sending files under non-emergency situations. A signed release by the clients and/or guardian from the sending provider should be received by AGENCY either prior to the transmission of the documents or should accompany the documents.
   C. Files sent to the Agency through ILHIE Direct are intended to be uploaded into Our EHR System under the Document Library in the client ECR. The SASS supervisor will act as the main person responsible for downloading files from ILHIE Direct, renaming the files, and uploading them into Our EHR System, with back-up as assigned by the supervisor.
   D. Automatic ILHIE notifications that a file has been received are currently set up to that ILHIE can be checked periodically throughout the business day. If you are waiting for a file to be sent, you can alert the SASS supervisor that you are expecting a file and need it to be uploaded into Our EHR System as soon as it is available.
   E. Downloaded files will be saved to the To-Us folder on the << Location >> Group Drive. Files should be named with the following naming convention:

      Firstname.lastinitial_document_hospital_MM-DD-YY

      Example: **tatiana.s_DischargeSummary_HOSP1_10-09-12**
      tatiana.s_DischargeSummary_HOSP3_10-09-12
      tatiana.s_DischargeSummary_HOSP2_10-09-12

      Other file names include: _Staffing_; _Meds_; _MedicalDischargeSummary_; _PsychiatricDischargeSummary_; _FaceSheet_; _Labs_;

   F. A notice will be sent to the primary SASS worker when a document is uploaded into Our EHR System via the Our EHR System message Center.

G. AGENCY will not keep files on ILHIE Direct for more than 2 weeks. The SASS supervisor will delete files on ILHIE Direct when the following conditions have been met: 1) files have been upload to Our EHR System and 2) the message containing the files is more than 7 days old.

6. To protect client PHI, folders for SENT ITEMS, TO-US, and FROM-US, both in ILHIE and on AGENCY's Group Drive will be cleared out monthly. We will use the 1-month previous to the date of deletion as the last date to keep in the files. (ie: If today is June 1st, then all files previous to May 1st will be deleted.)